

Visitor Tracker Process

Overview

The approach involves these steps...

- Initial setup (Administrator):
 - Create a list of questions and attestation statement.
- Visitor Portal User captures each visit to identify who the visitor is visiting, answer Wellness Questions, and to Attest to the truth and accuracy of their Wellness answers.
 - They click a link to invoke a visitor login form.
 - Portal Users enter their name and who they will be visiting, submit a wellness questionnaire, and upon submittal, their visit history and wellness attestation is tracked in the system.
- Administrators and auditors can log into imPowr at any time to view the responses.
 - View the wellness submissions made and a quick assessment of risk.
 - View a history of visits and trace who else the visitor came in contact with.
 - Export the data to Excel.

Initial Setup (Administrator)

Configuring the list of wellness questions and attestation text

- Refer to the section on creating or editing wellness questions and attestation text.

Configuring the Visitor Portal Messages

- Refer to the section on creating or editing Visitor Portal Messages.

Preparing for Activation of the Visitor Portal

A Staff Member will need to sign in to the Visitor Portal to activate it, after any time it is turned off and before Visitors can begin to use it. Once signed in, it can remain that way for as long as the system allows it to remain turned on without any activity.

Staff members with this responsibility will need to have the appropriate account roles assigned to them, which give them access to the Visitor Portal.

Setting Up or Editing the Staff Member Account Role so they can sign into the portal

If not already completed by Continual Care Solutions, go to the account role screen and either set-up or confirm the Account Role user rights...then provide Visitor Portal access to your staff portal users (see below).

- Click on **System**.

- Click on **Account Roles** in the Settings & Security section of the **System** menu:



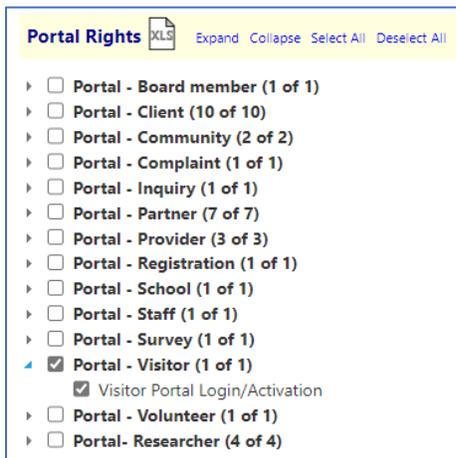
The **Account Role** rights will be displayed:



- Click on **Portal Rights “Edit”**.



- Scroll down to **Portal – Visitor** and expand the entry by clicking on the arrow to the left of the selection box.
- Ensure the **Visitor Portal Login** is selected – if not, check the box to select.



- Click on **Save** to save your Portal Rights selection.
- Click on **Save** and exit the setup screen and save your Account Role settings.

User Workflow

NOTE: For the remainder of this document, we will assume the appropriate Account Role has already been established, the Visitor Portal is made available, and the Staff Member has been set up as a Visitor Portal User. The Staff Member should also have been provided with the following link to access the portal:

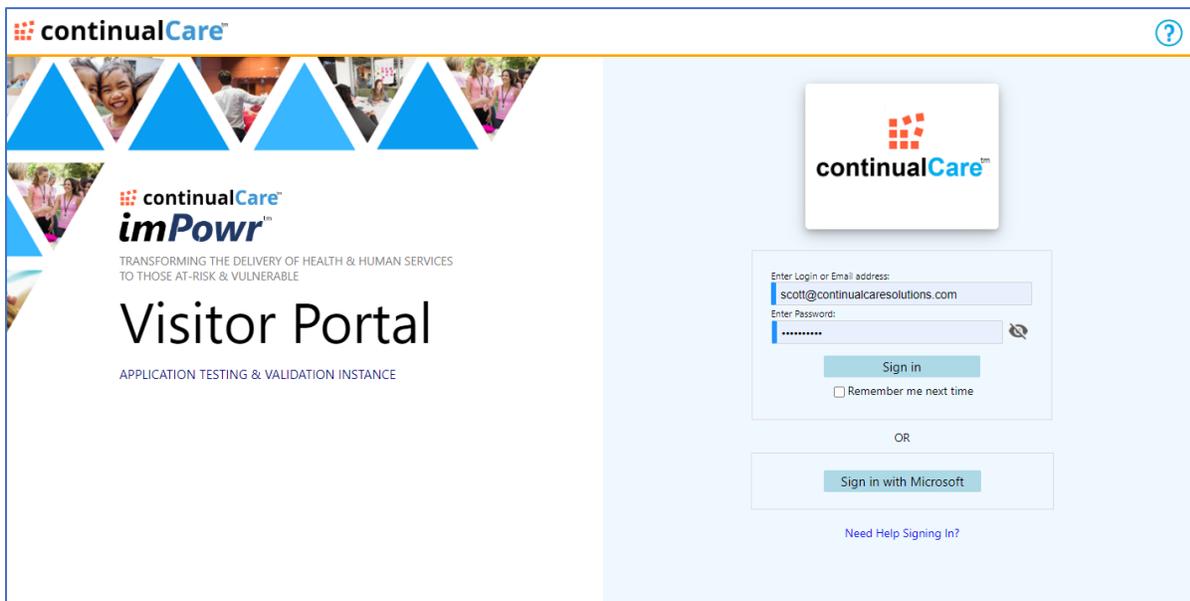
<https://xxxxxx.azurewebsites.net/forms/Home?P=13> Where “xxxxxx” is your imPowr website name.

Staff Member Logging In (Visitor Portal Activation)

- Launch the application by accessing your **imPowr website**.

NOTE: It is a good idea to save the link as a favorite for future use, to avoid having to type it in every day. The way you do that varies by browser. In Chrome you can just click the ‘bookmarks’ star  that appears at the upper left of the browser window.

- When the login screen appears...



- Enter the Staff Member’s (Visitor Portal User’s) **Login or Email address**.
- Enter their password.
- Click **Sign in**.

NOTE: Users may find it convenient to have their browser remember their log in credentials, so they don’t have to enter it every day.

After a successful login, you will be directed to the Visitor Portal visitor screen.

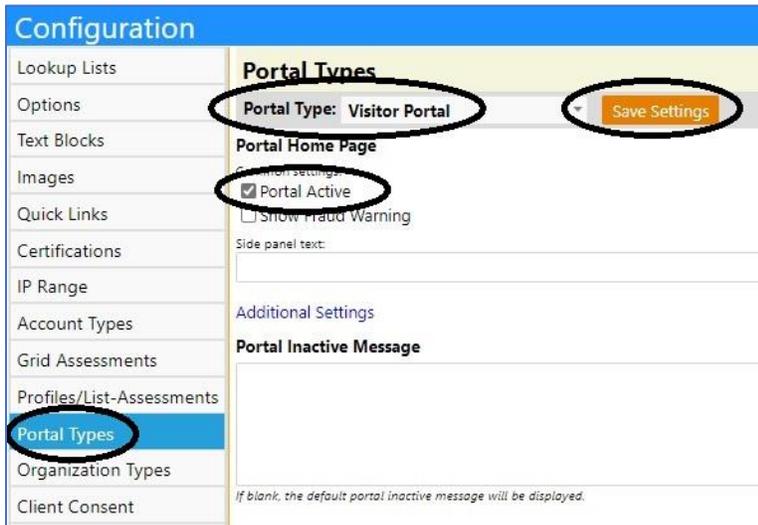
Troubleshooting

If the Visitor Portal does not seem to activate after taking these steps, please try the following before contacting Continual Care Solutions:

Access the **Configuration** screen in the **Settings & Security** section of the **System** menu.



- Click on **Portal Types**.
- Select the “**Visitor Portal**” portal type.
- Make sure Portal Active is checked. If it is not, check the **Portal Active** box.
- Click on **Save Settings**.

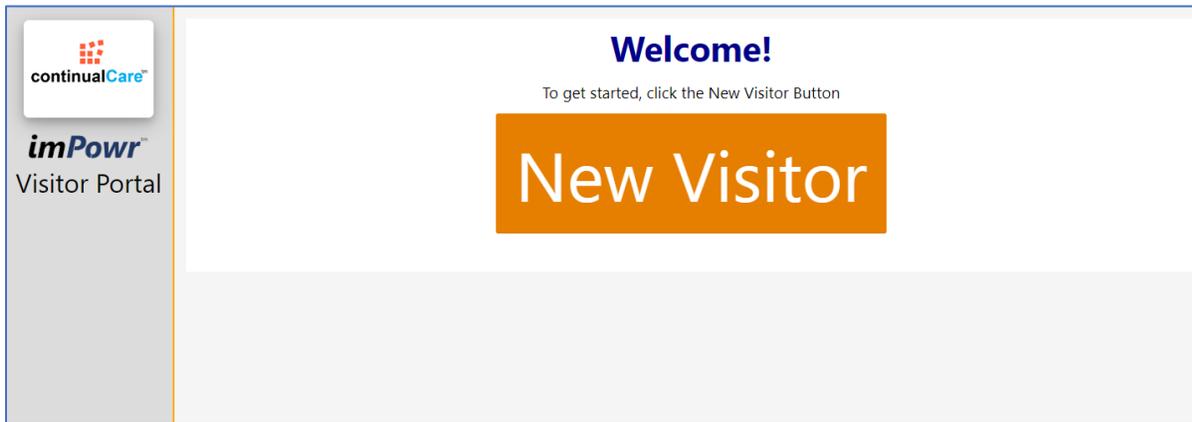


- Click on **Options** and select **Portals**.
- Click on **Visitor Wellness Check – Active**.
- Make sure the **Setting** value is “**yes**”. If it is not that value, change it to “**yes**”.
- Click on **Save & Apply**.



Visitor Logging In

When a visitor comes to the portal, the following is the first screen they see:



The initial welcome message is user configurable (refer to the section on text configuration).

Clicking the “**New Visitor**” button, the Visitor Portal displays Visitor sign in screen with both the questions you set up as well as the visitor attestation for their responses:

New Visitor
Cancel

Instructions
Enter your name, company, and the purpose of your visit today.

Visitor Information

Salutation: First:* Middle: Last:* Suffix:

Phone: Email:

Organization/Company that you are representing: Who you are visiting today*:

Wellness Questions

Have you travelled to any of the states that NY identified for travel restrictions - for purposes other than essential work, business, or where you spent more than 3 hours of time? Yes No

Have you had a positive COVID-19 test in the past 14 days? Yes No

Have you had close contact with any persons with confirmed or suspected COVID-19 within the last 14 days? Yes No

Have you had COVID-19 Symptoms in the last 14 days? Symptoms include: cough, sore throat, fever, chills, muscle pain, shortness of breath, difficulty breathing or new loss of taste or smell? Yes No

Is your body temperature above 100 deg F? Yes No

Please indicate your relationship with the individual you are visiting.

Wellness Attestation & Submission
I attest that my answers to the above questions are to the best of my knowledge, true and accurate.

The Instructions are user configurable – please refer to the section on configuring Visitor Portal Messages.

The fields with a blue bar (First, Last, and Who you are visiting today) are mandatory, as are the Wellness Questions and the Attestation & Submission. All other fields are optional.

- Select an answer for each question and attest to the accuracy of your entries.
- Click **Submit**.

NOTE: On a mobile device, the screens may look a little different and you may need to “zoom in” with your fingers to make the text a little larger and easier read.

New Visitor
Cancel

Instructions
Enter your name, company, and the purpose of your visit today.

Visitor Information

Salutation: First:* Middle: Last:* Suffix:

Phone: Email:

Organization/Company that you are representing: Who you are visiting today*:

Wellness Questions

Have you travelled to any of the states that NY identified for travel restrictions - for purposes other than essential work, business, or where you spent more than 3 hours of time? Yes No

Have you had a positive COVID-19 test in the past 14 days? Yes No

Have you had close contact with any persons with confirmed or suspected COVID-19 within the last 14 days? Yes No

Have you had COVID-19 Symptoms in the last 14 days? Symptoms include: cough, sore throat, fever, chills, muscle pain, shortness of breath, difficulty breathing or new loss of taste or smell? Yes No

Is your body temperature above 100 deg F? Yes No

Please indicate your relationship with the individual you are visiting.

Wellness Attestation & Submission
I attest that my answers to the above questions are to the best of my knowledge, true and accurate.

Depending on the submitted response, the visitor will receive one of the following messages:

Thank You Close



Thank you for your submission and for participating in our wellness check process. You are helping your coworkers, our clients, and your community by helping reduce the risk of spreading the virus.

You are welcome to continue with your visit!

Check with Receptionist Close



Thank you for your submission and for participating in our wellness check process
- **Your responses indicate a possible wellness issue.**

To keep yourself and others safe, **You cannot visit today.**

Please contact whoever you had planned to visit to let them know and to reschedule your visit for another day. Thank you!

After a few seconds, the message will go away, and the screen will return to the “New Visitor” display to await another visitor.



imPowr™
Visitor Portal

Welcome!
To get started, click the New Visitor Button

New Visitor

Viewing Entries - Administrator View

- Log in to your imPowr website, as the Administrator Role.
- Click on **Dashboards** in the menu.
- Click on **Visitors** in the Wellness & Visitors section:



The Administrator view of the Visitor Tracker will be displayed:

| ID | Sal | Name | Most Recent Visit | Most Recent Wellness | Most Recent Person Visited |
|-------|-----|-------------------|--------------------|----------------------|----------------------------|
| 00038 | | Kolbert, Greg | 7/30/2020 12:45 PM | At Risk | Ethan Bergstrom |
| 00037 | | Wood, Serena | 7/30/2020 9:45 AM | Wellness Acceptable | Mike |
| 00036 | | Smith, Taylor | 7/30/2020 9:44 AM | Wellness Acceptable | Emma |
| 00035 | | Brown, Ashley | 7/30/2020 9:43 AM | Wellness Acceptable | Emma |
| 00034 | | Kamish, Mike | 7/30/2020 8:16 AM | Wellness Acceptable | uyu |
| 00033 | | Dixon, George | 7/28/2020 1:37 PM | Wellness Acceptable | Louis |
| 00032 | | Washington, Eliza | 7/28/2020 1:33 PM | Wellness Acceptable | Phillip |

View the list and filter further, as needed.

Note that the List displays the Most Recent Visit, the Most Recent Wellness, and the Most Recent Person Visited.

- Click on the **Visit ID** to see a history of the Visitor’s most recent visit as well as their past visits and Wellness Check attestations:

| Visit ID | Visit Date | Wellness | Person visited | Company Representing | Location |
|----------|--------------------|------------|----------------|----------------------|----------------|
| 00047 | Jul 15 2020 5:45PM | At Risk | Albert Corman | | Visitor Portal |
| 00046 | Jul 15 2020 5:44PM | Acceptable | John Thomas | | Visitor Portal |
| 00045 | Jul 15 2020 5:43PM | Acceptable | Terri Hansen | | Visitor Portal |

- Click on **Edit** to add or change any of the Visitor’s contact information or comments.
- Click on **Save** when completed with your updates or changes.

Visitor: Coleman, Donovan Edit Close

Visitor Information
 Salutation: First: Middle: Last: Suffix:
 Dr. Donovan NA Coleman III

Contact Information
 Email: Phone:
 NA NA
 Address 1: Address 2:
 NA NA

Comment

Visitor: Coleman, Donovan Apply Save Cancel

Visitor Information
 Salutation: First* Middle: Last* Suffix:
 Dr. Donovan Coleman III

Contact Information
 Phone: Email:
 Address 1: Address 2:
 City: State: ZIP code:
 New York

Comment

Visits

| Visit ID | Visit Date | Wellness | Person visited | Company Representing | Location |
|--------------------------------|--------------------|------------|----------------|----------------------|----------------|
| <input type="checkbox"/> 00047 | Jul 15 2020 5:45PM | At Risk | Albert Corman | | Visitor Portal |
| <input type="checkbox"/> 00046 | Jul 15 2020 5:44PM | Acceptable | John Thomas | | Visitor Portal |
| <input type="checkbox"/> 00045 | Jul 15 2020 5:43PM | Acceptable | Terri Hansen | | Visitor Portal |

Based on the Staff Portal User’s response, and the risk rules you set up when you set up your questions, the level of Risk is established.

- Click the **Export** icon on top of the window to generate an export of the summary.

Visitors Export New Visitor Delete Return

Show: Top 50 All Most Recent Visit All Time 7/31/2019 thru 7/31/2020 Name (last, first):

| ID | Sal | Name | Most Recent Visit | Most Recent Wellness | Most Recent Person Visited | H |
|--------------------------------|-----|---------------|--------------------|----------------------|----------------------------|---|
| <input type="checkbox"/> 00038 | | Kolbert, Greg | 7/30/2020 12:45 PM | At Risk | Ethan Bergstrom | |
| <input type="checkbox"/> 00037 | | Wood, Serena | 7/30/2020 9:45 AM | Wellness Acceptable | Mike | |
| <input type="checkbox"/> 00036 | | Smith, Taylor | 7/30/2020 9:44 AM | Wellness Acceptable | Emma | |
| <input type="checkbox"/> 00035 | | Brown, Ashley | 7/30/2020 9:43 AM | Wellness Acceptable | Emma | |
| <input type="checkbox"/> 00034 | | Kamish, Mike | 7/30/2020 8:16 AM | Wellness Acceptable | uyu | |
| <input type="checkbox"/> 00033 | | Dixon, George | 7/28/2020 1:37 PM | Wellness Acceptable | Louis | |

Deleting a Visit Attestation

There may be times when a Visit is added in error or is done for training or Testing purposes. These may be deleted – but only one at a time and a special privilege is required. This privilege should be restricted to only those permitted to make that compliance related assessment.

To delete a visit...

- check the box to the left of the visitor’s name.
- Click on Delete.

| ID | Sal | Name | Most Recent Visit | Most Recent Wellness | Most Recent Person Visited | H |
|-------------------------------------|-------|---------------|--------------------|----------------------|----------------------------|---|
| <input type="checkbox"/> | 00038 | Kolbert, Greg | 7/30/2020 12:45 PM | At Risk | Ethan Bergstrom | |
| <input type="checkbox"/> | 00037 | Wood, Serena | 7/30/2020 9:45 AM | Wellness Acceptable | Mike | |
| <input checked="" type="checkbox"/> | 00036 | Smith, Taylor | 7/30/2020 9:44 AM | Wellness Acceptable | Emma | |
| <input type="checkbox"/> | 00035 | Brown, Ashley | 7/30/2020 9:43 AM | Wellness Acceptable | Emma | |
| <input type="checkbox"/> | 00034 | Kennish, Mike | 7/30/2020 9:15 AM | Wellness Acceptable | ... | |

Visitor Tracker Questions

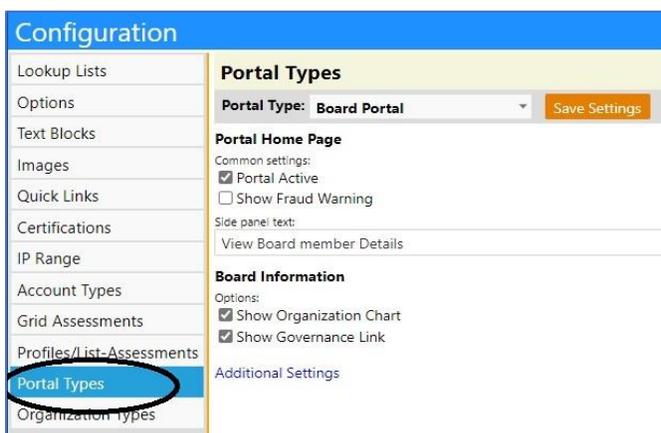
When a user submits a Visit they have to answer specific wellness related questions and either receive a message indicating their response indicates a potential risk and they should reschedule their visit for another day, or their responses are acceptable, a message indicating they can continue with their visit is displayed.

Those wellness questions and the messages are fully customizable.

To create the wellness questions, access the **Configuration** screen in the **Settings & Security** section of the **System** menu.



- Select **Portal Types** from the list:



- Select the “**Visitor Portal**” portal type and click **Additional Settings**.

- Fill out or Edit the **Attestation** and **Questions**.
- Ensure your **Risk Response** determinants are appropriate.
- Click **Save**.

| Question | Sort Order | Entry Type | List Choices (split with ' ') | Risk Response (Response that indicates risk) | Log Count |
|---|------------|--|-------------------------------|--|-----------|
| [Q1] Have you travelled to any of the states that NY identified for travel restrictions - for purposes other than essential work, business, or where you spent more than 3 hours of time? | 0 | <input checked="" type="radio"/> Yes/No <input type="radio"/> List <input type="radio"/> Text <input type="radio"/> Temperature | | yes | 8 |
| [Q2] Have you had a positive COVID-19 test in the past 14 days? | 10 | <input checked="" type="radio"/> Yes/No <input type="radio"/> List <input type="radio"/> Text <input type="radio"/> Temperature | | yes | 35 |
| [Q3] Have you had close contact with any persons with confirmed or suspected COVID-19 within the last 14 days? | 20 | <input checked="" type="radio"/> Yes/No <input type="radio"/> List <input type="radio"/> Text <input type="radio"/> Temperature | | yes | 35 |
| [Q4] Have you had COVID-19 Symptoms in the last 14 days? Symptoms include: cough, sore throat, fever, chills, muscle pain, shortness of breath, difficulty breathing, or new loss of... | 30 | <input checked="" type="radio"/> Yes/No <input type="radio"/> List <input type="radio"/> Text <input type="radio"/> Temperature | | yes | 35 |
| [Q5] Is your body temperature above 100 deg F? | 40 | <input checked="" type="radio"/> Yes/No <input type="radio"/> List <input type="radio"/> Text <input type="radio"/> Temperature | | yes | 35 |
| [Q6] Please indicate your relationship with the individual you are visiting. | 50 | <input type="radio"/> Yes/No <input checked="" type="radio"/> List <input type="radio"/> Text <input type="radio"/> Temperature | Family Friend Agent Other | | 35 |

There are 4 types of questions which may be asked:

- **Yes/No**
For these kinds of questions, the Staff Member can only answer with a Yes or a No. Depending on what you set up as your Risk Response, the “At Risk” indication may or may not occur. The “At Risk” Response is set by you entering what you want the trigger to be, in the Risk Response field. If you indicated the trigger would occur if someone were to answer “Yes” for this question... if they did answer the question in that way, they would get a Wellness of “At Risk” regardless of how they

answered their other questions; comparatively, if they answered “No” for that question, for that question, there would be no concerns and their potential “At Risk” status would only be based on the other questions.

- **List**

These kinds of questions allow the Staff Member to select their answer from a drop-down list of answers. The drop-down list must be created for them in the set-up. Answers are separated by a pipe symbol (“|” found on the key above the Enter key on your keyboard). For example, to create a drop-down list of the letters A, B, and C, I would create the List Choice as A|B|C. Depending on what you set up as your Risk Response, the “At Risk” indication may or may not occur. The “At Risk” Response is set by you entering what you want the trigger to be, in the Risk Response field. If you indicated the trigger would occur if someone were to select one specific answer from the drop-down list for this question... if they did answer the question in that way, they would get a Wellness of “At Risk” regardless of how they answered their other questions; comparatively, if they selected a different answer for that question, for that question, there would be no concerns and their potential “At Risk” status would only be based on the other questions.

- **Text**

This kind of question allows a user to enter free text. The answer is not tracked and is not used to trigger any kind of Risk. It is not common to use this type of question in the Visitor Tracker, but it could be used for purposes such as “Enter your Visitor Badge number”, etc.

- **Temperature**

This kind of question allows the temperature to be manually input into the field – so there is a record of the temperature and it is kept as a record with the other Wellness Check responses.

*NOTE: You may add or edit questions at any time. You may only delete a question if no data has been collected for it. Please review the **Log Count** next to the question in the set-up page. If any number greater than ‘0’ exists, then data has been collected (i.e., the question has been responded to by someone) and the question can no longer be deleted (but it still can be edited and its sort order changed).*

- Click on **Save** when completed with your set-up/changes.

Visitor Tracker Messages

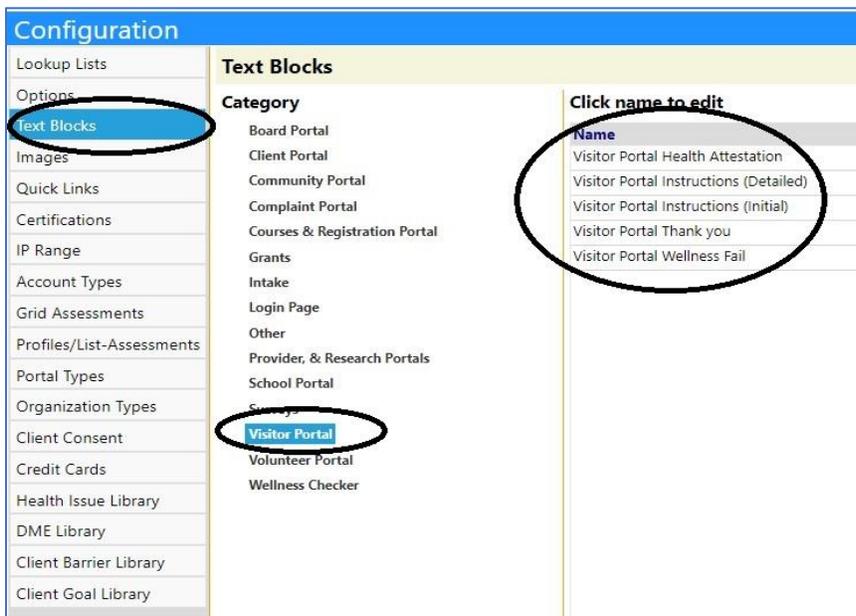
Portal Instructions, Thank you (wellness pass), and At Risk (wellness fail) messages are completely user-configurable and can be set-up in the configuration page.

To change the Visitor Portal messages...

- Remain in the **Configuration** in the Settings & Security section of the **System** menu:



- Select **Text Blocks**.
- Select **Visitor Portal**.
- Select the message(s) you wish to modify:
 - **Visitor Portal Health Attestation.**
 - **Visitor Portal Instructions (Detailed).**
 - **Visitor Portal Instructions (Initial).**
 - **Visitor Portal Thank you.**
 - **Visitor Portal Wellness Fail.**



Edit Visitor Portal Health Attestation Preview Apply Save Cancel

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Table of Contents, Zoom, Help.

I attest that my answers to the above questions are to the best of my knowledge, true and accurate.

Reserved words: Double-click to select, copy with Ctrl-C then paste with Ctrl-V

- General
- My Account
- My Organization

Design </> HTML Preview

Edit Visitor Portal Instructions (Detailed) Preview Apply Save Cancel

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Table of Contents, Zoom, Help.

Enter your name, company, and the purpose of your visit today.

Reserved words: Double-click to select, copy with Ctrl-C then paste with Ctrl-V

- General
- My Account
- My Organization

Design </> HTML Preview

Preview Scope Maximum Length: 50000

Edit Visitor Portal Instructions (Initial) Preview Apply Save Cancel

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Table of Contents, Zoom, Help.

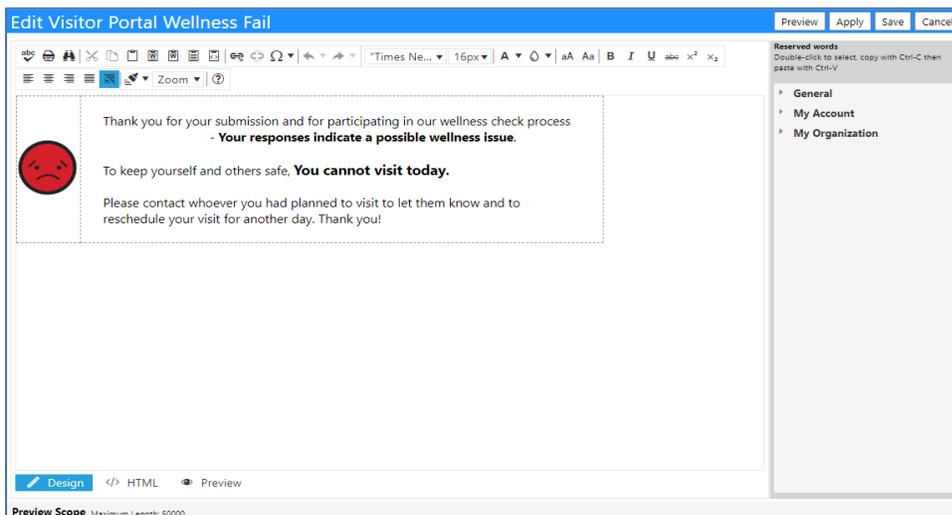
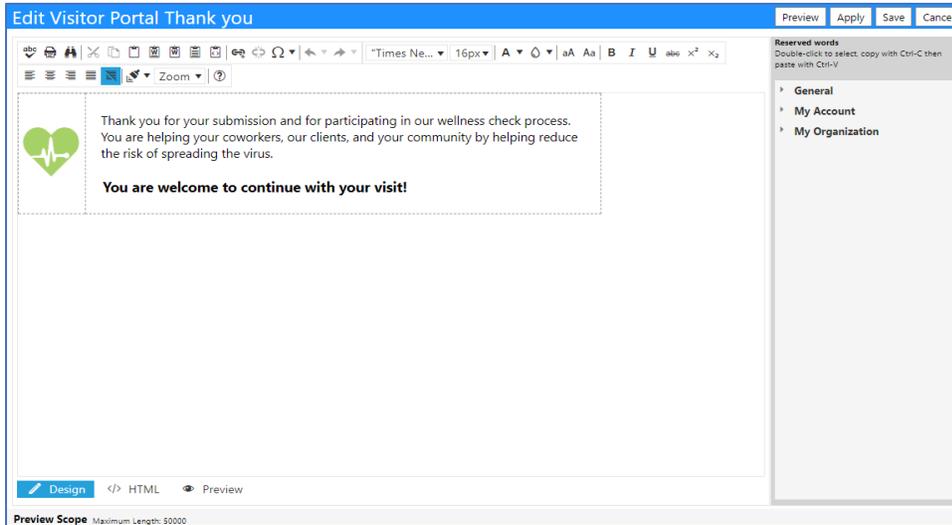
To get started, click the New Visitor Button

Reserved words: Double-click to select, copy with Ctrl-C then paste with Ctrl-V

- General
- My Account
- My Organization

Design </> HTML Preview

Preview Scope Maximum Length: 50000



Note: both text and pictures can be entered into the documents. Feel free to add in pictures, graphics, change fonts, font sizes, etc.

- Click on **Save** when you are completed with your changes.